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Welcome to ClearSCADA

Welcome to ClearSCADA, our SCADA system software. ClearSCADA is a powerful client-server SCADA system with:

- Online configuration including mimics (graphic display), trends, communications objects, points, schedules, reports, etc.

- Built-in, fully featured historian

- OPC and ODBC support at both the client and server

- Web server and IT integration features

- Query-based lists of database items

- IEC 6-1131 programming language support

This document is a guide to help new users install ClearSCADA. A background in both programmable logic controllers (PLC) and personal computers (PC) using Windows is highly recommended. If any problems arise during the setup, it may be necessary to consult the ClearSCADA User’s Manual or call our Technical Support Department for assistance.

**Technical Support: The Americas**
Available: Monday to Friday 8:00am - 6:30pm Eastern Standard Time
Toll free within North America: 1-888-226-6876
Direct Worldwide: +1 (613) 591-1943
Email: technicalsupport@controlmicrosystems.com

**Technical Support: Europe, Africa, Middle East**
Available: Monday to Friday 8:30am - 5:30pm Central Europe Standard Time
Direct Worldwide: +31 (71) 579 1655
Email: euro-support@controlmicrosystems.com

**Technical Support: Asia Pacific**
Available: Monday to Friday 8:30am - 5:30pm Australian Eastern Standard Time
Direct Worldwide: +61 3 9249 9580
Email: au-support@controlmicrosystems.com
Getting Started

After inserting the CD, the following screen will be displayed.

A number of different options are available:

- Installation Guide – displays this document
- Install ClearSCADA – starts the ClearSCADA installation program
- Getting Started – provides short tutorial videos showing you how to get started with ClearSCADA and information on using DNP3 and SCADAPack Modbus protocols
- Release Notes – what’s new in this version of ClearSCADA
- Upgrading – information on upgrading existing versions of ClearSCADA
- Exit – closes the ClearSCADA setup utility
System Requirements

Operating Systems

ClearSCADA can be installed on 32 bit or 64 bit computers.

Systems running on server hardware need to use server operating systems such as Windows Server 2008, Windows Server 2003, or Windows Server 2000. Server operating systems are designed for servicing entire systems rather than individual computers or small networks, and are therefore better suited for larger ClearSCADA systems with more than two clients.

Systems running on desktop hardware need to run desktop operating systems that are designed for user interaction on the computer on which they are installed. ClearSCADA supports the following operating systems:

- Windows 7
- Windows Vista and Windows Vista SP2
- Windows XP

**NOTE:** Windows XP, Windows Vista, and Windows 7 should not be used for servers with more than two clients as the TCP/IP security measures in these operating systems can cause significant delays.

32 Bit Operating Systems

ClearSCADA can be installed on computers using the following operating systems:

Server Hardware

- Windows Server 2008 (Standard and Enterprise editions) - initial release/Service Pack 2
- Windows Server 2003 (Standard and Enterprise editions) - Service Pack 1/Release 2, and Service Pack 2
- Windows 2000 Server - Service Pack 4
Desktop Hardware
- Windows 7 (Ultimate and Professional editions)
- Windows Vista (Ultimate and Business editions) - initial release, Service Pack 1, Service Pack 2
- Windows XP (Professional Edition) - Service Pack 2 (including 2a, 2b, and 2c), and Service Pack 3

ClearSCADA also requires Internet Explorer 6, Internet Explorer 7 or Internet Explorer 8. Other browsers are not supported.

NOTE: Crystal Reports XI Release 2 is not supported on Windows Server 2008.

64 Bit Operating Systems
ClearSCADA can be installed on computers using the following operating systems:

Server Hardware
- Windows Server 2008 R2
- Windows Server 2008 (Standard and Enterprise editions) - initial release/Service Pack 2
- Windows Server 2003 (Standard and Enterprise editions) - Service Pack 1/Release 2, and Service Pack 2

Desktop Hardware
- Windows 7 (Ultimate and Professional editions)
- Windows Vista (Ultimate and Business editions) - initial release, Service Pack 1, Service Pack 2

ClearSCADA also requires Internet Explorer 6, Internet Explorer 7 or Internet Explorer 8. Other browsers are not supported.

NOTE: Crystal Reports XI Release 2 is not supported on Windows Server 2008.

Recommended PC Configurations
The following table lists the recommended PC configurations for a variety of client and server scenarios. In the table, the term ‘object’ refers to a database item whereas ‘point’ refers to a specific type of database item that stores I/O (a database point). Historic points are database points that have the Historic feature enabled.
<table>
<thead>
<tr>
<th>Application</th>
<th>PC Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small stand-alone client-server with up to 1000 objects</td>
<td>2GHz processor, 512MB RAM, 500MB free disk space. Desktop class hardware and operating system.</td>
</tr>
<tr>
<td>Small stand-alone client-server with up to 10,000 objects and 1-2 remote clients</td>
<td>2GHz processor, 3GB RAM, 25GB free disk space. Desktop class hardware and operating system.</td>
</tr>
<tr>
<td>Server with 10,000 objects, 5,000 historic points stored for 2 years on-line, 3 or more clients</td>
<td>2 x 2GHz processor, 2GB RAM, 100GB free disk space, separate disk for historic data. Server class hardware and operating system. For 32 bit operating systems, the 3GB address space should be enabled.</td>
</tr>
<tr>
<td>Server with 50,000 objects, 25,000 historic points stored for 2 years on-line, multiple clients</td>
<td>2 x 3GHz processor, 4GB RAM, 100GB free disk space, separate disk for historic data. Server class hardware and operating system. For 32 bit operating systems, the 3GB address space should be enabled.</td>
</tr>
<tr>
<td>Server with 100,000 objects, 75,000 historic points stored for 2 years on-line, multiple clients</td>
<td>4 x 3GHz processor, 6GB RAM, 140GB Raid 5 disk set for operating system and configuration database. 1TB x Raid 5 disk set for historic data. Server class hardware and operating system. For 32 bit operating systems, the 3GB address space should be enabled.</td>
</tr>
<tr>
<td>Server with 175,000 objects, 100,000 historic points stored for 2 years on-line, multiple clients</td>
<td>4 x 3GHz processor, 8GB RAM, 140GB Raid 5 disk set for operating system and configuration database. 2TB x Raid 5 disk set for historic data. 64 bit server class hardware and operating system.</td>
</tr>
<tr>
<td>Server with 250,000 objects, 150,000 historic points stored for 2 years on-line, multiple clients</td>
<td>8 x 3GHz processor, 12GB RAM, 140GB Raid 5 disk set for operating system and configuration database. 4TB x Raid 5 or Raid 0+1 disk set for historic data. 64 bit server class hardware and operating system.</td>
</tr>
<tr>
<td>Server with 450,000 objects, 250,000 historic points stored for 2 years on-line, multiple clients</td>
<td>8 x 3GHz processor, 24GB RAM, 140GB Raid 5 disk set for operating system and configuration database. 4TB x Raid 5 or Raid 0+1 disk set for historic data. 64 bit server class hardware and operating system.</td>
</tr>
</tbody>
</table>
Where multiple CPUs are mentioned in the table (above), multiple core processors can be used for a similar result i.e. a dual core processor can be used in place of two processors.

**NOTE:** The typical point to object ratio is around 1:2, so for a system with 50,000 points, this equates to around 100,000 objects. However, ratios vary per system and this should only be regarded as an estimate. Some ratios may require lower or higher specification computers, depending on the actual configuration.

**NOTE:** The amount of disk space required is determined by the number of historic and event journal records stored over time. This can be calculated from the size of each historic record and event journal record.

**More Information**

For more information on recommended PC configuration, including disk configurations, refer to the ClearSCADA online help available on the ClearSCADA install CD:

1. Navigate to CD:\Documentation
2. Open the file ViewX.chm (this is the ClearSCADA help file)
3. Using the tree view on the left hand side, navigate to Core Reference -> Server Administration -> Welcome to the Server Administration Guide -> System Server Requirements
4. For information on client requirements, navigate to Core Reference -> Client Administration -> Welcome to the ClearSCADA Guide to Client Administration -> Client PC Requirements
5. For further advice, please contact Technical Support
ClearSCADA Demonstration Version

When installing ClearSCADA for the first time, it is recommended that you install the Full (Recommended) Version. The Full (Recommended) Version installs a subset of common drivers and core functionality of the ClearSCADA software and ViewX client as well as the following:

- Overview Tutorial
- Sample Projects
- Symbol Library

The Demonstration version of ClearSCADA does contain some limitations as compared to the fully licensed version of ClearSCADA. These include:

- The ClearSCADA Server will run for 2 hours at a time then automatically shut down.
- The ClearSCADA Server is limited to 1000 points. Once you exceed this number you will be unable to create additional points in the database.
- The ClearSCADA Server will allow you to connect 2 ViewX clients, 1 OPC client, 1 Data access client and 2 Web clients. If you purchase a license for ClearSCADA, it will define the number of clients that can attach to your server.
- You will not be able to configure 2 or more ClearSCADA Servers in a redundant configuration in Demonstration Mode. If you wish to evaluate ClearSCADA in a redundant configuration then we suggest that you discuss this with your ClearSCADA distributor.

See Appendix B for details on requesting and installing a ClearSCADA license.
Installing ClearSCADA

Before beginning the installation, please ensure the following:

- You are logged onto your computer with administrator privileges
- All firewalls are turned off (i.e. Norton, ZoneAlarm, BlackICE, etc.)
- All other applications are closed

1. Select the Install ClearSCADA option from the ClearSCADA Setup window and then Next to begin the installation.

   NOTE: The ClearSCADA installer will install any prerequisites before beginning the main installer.

2. Review the Licence Agreement and select “I accept the terms in the Licence Agreement”. Click Next.
3. Enter your user details and click Next.

4. Select the Full (Recommended) option.

The following setup types are available:

- **Full (Recommended)** – this installs both the client and server components for running ClearSCADA on a single machine. This install also includes the example projects and is recommended for new users.

- **Typical** – this installs the most common server and client components and allows the user to select from Server and clients, clients only or data access components. Example projects are not installed. This is recommended for more advanced users.
Custom – this allows the user to define the required installation components. This is recommended for users familiar with ClearSCADA operation.

5. ClearSCADA will prompt you to create a username and password for the Super User account. Enter a username and password. The Super User has security privileges above and beyond all other users on the system. Click Next.

6. Click Install to begin the installation.
7. Select Finish to allow the Demo Projects launcher to begin.

8. The ClearSCADA Server will start, the ViewX client will start and the example database (with sample programs and overview tutorial) will be imported. (This may take a few minutes, please be patient).

You should now be running the ClearSCADA Server. This is indicated by the presence of the blue icon in the system tray (lower right corner of the screen). If this icon is not present, or is another color, the ClearSCADA Server is not running properly. If the server is not running properly please refer to Appendix A - Troubleshoot ClearSCADA Installation at the back of this document.
You should also be running the ViewX client as indicated in the screen shot below. Please note that the demo projects in the Demonstration Version will trigger system alarms resulting in an audible alarm bell. To silence the alarm, right click on the large red ‘10’ button (this number may be different on your screen) in the lower left corner of the screen and select Disable Bell.

Two new shortcuts have been added to your desktop. The ClearSCADA Service Manager is used for manually starting and stopping the ClearSCADA Server.

The ViewX shortcut may be used to launch the ViewX client for any subsequent ClearSCADA evaluation sessions.
Next Steps

A number of tools are available to help new users get started with ClearSCADA.

1. Videos – from the ClearSCADA Setup utility, select Getting Started. From this page three videos are available;
   a. Introduction to ClearSCADA – this provides a general introduction to the concepts used in ClearSCADA. This video will take you through creating points, mimics, alarms, trends and object menus.
   b. Introduction to DNP3 – this video will show you how to create database objects to communicate with a DNP3 device.
   c. Introduction to SCADAPack Modbus – this video will show you how to create database objects to communicate with a SCADAPack RTU.

2. ClearSCADA Tutorial – the online help contains a Tutorial for users to step through their first configuration. This will explore concepts such as using ViewX, using the WebX client, configuration as well as templates and instances.

3. Presentation – as part of the installed Example Projects, a presentation is available that describes the key features and benefits of ClearSCADA and how ClearSCADA differs from other products. This provides a great overview of the key concepts that will be useful as you start to design and build ClearSCADA systems.

4. Example Projects – the example projects installed as a part of the Demonstration Installation show you how to configure a real database, considering concepts such as database structure, security as well as templates and instances.

Further information is available on our Resource Centre and you can obtain support from other ClearSCADA users on the SCADAForum. Links to both sites are available on our website.
Appendix A - Troubleshoot ClearSCADA Installation

The installation may take a few minutes, and is completed automatically unless:

- There is insufficient disk space. If you have this problem, you need to make more disk space available by deleting files or installing additional disk space.

- The source files cannot be found. If this occurs, you need to ensure that ClearSCADA can access the installation files on the ClearSCADA CD-ROM.

- There has been an error in the installation procedure. If this occurs, you should contact Technical Support.

- Your Microsoft Windows user account does not have the administrator level privileges. Refer to your Microsoft Windows documentation for more information.

- You have a software firewall running during the installation that interferes with the installation. While the installer should work with firewalls, if you have problems, try running the installer with the firewall disabled.

Appendix B – Adding a licence to your system

Once installed, when the ClearSCADA Server is started, it will run in demo mode for a period of 2 hours. Once the 2 hour period has expired, the Server will shut down. Changes to the database and historic (logged) data will not be lost when this happens. A user simply needs to restart the server to re-establish a connection to the database.

Licensing ClearSCADA can be performed in one of the following two ways:

- Hardware License (USB dongle)
- Software License (.lic file)

Hardware License

The USB key hardware license has the advantage of not being PC specific. The key can be used on any PC running ClearSCADA which means a user may, in effect, “take” their license with them. The downside to the USB key hardware license is that once removed, ClearSCADA reverts back to demo mode which means the USB key must be inserted at all times in order for the license to be seen as ‘valid’ by the ClearSCADA Server.
Hardware licenses are typically shipped with the ClearSCADA CD at the time of order.
To obtain a USB key hardware license, email your inquiry to: SCADACare@controlmicrosystems.com
Within one business day, you will receive a response to your email complete with instructions of delivery.

**Software License**

The software license has the advantage of being permanently installed on the PC, thereby ensuring that ClearSCADA will always be licensed on that machine. The downside to the software license is that it is hard coded to the PC’s machine ID. Should a hardware configuration be made to the PC (i.e. adding a new network card) that changes the PC’s machine ID, the software license may become invalid and a new license will need to be installed.

A software license cannot be transferred from one PC to another. It is PC specific.

To obtain a software license:

1. Start the ClearSCADA Server and right click on the “ClearSCADA Server icon” in the system tray (lower right corner of screen). Select “License Details” from the menu. Note the “Machine ID” number. To avoid transcription errors, we suggest that you copy and paste this number into an email (see step 2).

2. Email the following information to SCADACare@controlmicrosystems.com:
   - Machine ID (this should be copied and pasted from Step 1)
   - License serial number (located on back of CD case)

Within one business day, you will receive a response to your email complete with the required license file and instructions to activate your license.

To activate your software license for the server:

- Save the attached license file to your computer (remember the location where you place the file)
- Start the Service Manager
- Right click on the server icon (in the system tray)
- Select License Details
- Browse to the license file
To activate your license for the local (embedded) client:

- From the Start menu, select Programs, Schneider Electric ClearSCADA – Configure ClearSCADA Connections. The ClearSCADA Client dialog will appear
- Click on the Licenses... button. The Client Licensing dialog will appear
- Click on the browse button located to the right of the License File field

**Note:** If odd characters exist in the License File field, delete them as they prevent the file browser from being displayed.

- Browse to the license file located on the hard drive and click Open
- In the Client Licensing dialog, click on Apply
- Click on the OK button
- Close the ClearSCADA Client dialog
- (Re)start ViewX

**Note:** the above steps are also used to activate the ViewX license on a remote client.

**Upgrading your License**

Both the hardware and software licenses may be upgraded after they are installed.

**Upgrading the USB key Hardware License**

- From the Start menu, select Programs, Schneider Electric ClearSCADA, Dongle Field Exchange Utility
- Click on “Get Locking Code”
- Send this locking code and the Dongle serial number in an email to: SCADACare@controlmicrosystems.com

Once the email is received, our customer support group will reply with a new unlocking code. Paste this code into the field below the “Get Locking Code” field in the Field Exchange Utility.

**Upgrading the Software License**

Email the following information to SCADACare@controlmicrosystems.com:

- Machine ID (see above)
- License serial number (located on back of CD case)
Within one business day, you will receive a response to your email complete with the required license file and instructions to upgrade your license.

**Appendix C - Starting and Stopping ClearSCADA**

The ClearSCADA Server icon is a separate application and is not part of the Server Service. The Server icon may be launched separately from the Server which means that the Server may be running but the icon may not be visible.

If the ClearSCADA Server is set to start automatically as a service on PC startup, the Server icon will appear as normal in the system tray. If the icon is not visible, you can launch the Server icon by clicking on Windows Start | All Programs | Schneider Electric | ClearSCADA | Server icon

If the ClearSCADA Server is stopped, the Server icon will appear greyed out like this:

![Greyed Out Icon]

If the ClearSCADA Server is running, the Server icon will appear blue like this:

![Blue Icon]

You can start the server by right clicking on the Server icon and selecting Start Server.
Similarly, if the server is currently running, right click on the icon and select the Shutdown Server option. You may be required to log on if security is enabled on your database. For the example projects loaded by the Demonstration install, enter the username as “Eng” with no password.
Appendix D – Stopping ClearSCADA from Running Automatically

The ClearSCADA Server runs as a Service in the Windows OS. Generally, the server is configured to startup at the same time as the machine boots up, however it is possible to setup ClearSCADA so that the database only runs when manually started (typically through the server icon).

To put the ClearSCADA Server Service into manual mode:
1. Open the Windows Control Panel
2. Select Administrative Tools and then Services
3. Locate ClearSCADA Server in the list
4. Double Click on ClearSCADA Server

5. Select the drop down arrow from the Startup Type field and select Manual

6. Click the Apply button and then the OK button to close the dialog

7. Close the Services dialog and Administrative Tools dialog

8. The ClearSCADA Server should now not start up automatically the next time the workstation is started
Appendix E – ClearSCADA Uninstall Procedure

Prior to uninstalling ClearSCADA, you should make a backup of required parts of the ClearSCADA database.

1. You can either:
   a. Export what you want to keep from ViewX by right-clicking on the appropriate group and selecting “Export”
   b. Backup the entire database folder. The location of the database folder can be found under “System Configuration - Location” in the server configuration dialog.
      1. Start the Server Configuration application by right-clicking on the Server Icon in the system tray and selecting “Configuration”.
      2. Browse to the System Configuration->Location
   c. Note that you should shut down the server before backing up the database in this manner.

2. If you have been issued a ClearSCADA soft license file for your computer, locate it and save it somewhere safe. It will be a .lic file.

To uninstall ClearSCADA:

1. Stop the ClearSCADA server and close ViewX.
2. Remove any system DSN using the “Schneider Electric ClearSCADA Driver”. Check in Control Panel | Administrative Tools | Data Sources (ODBC) on the ‘System DSN’ tab.
4. Delete the ClearSCADA install and database directories as well as the settings folder. Refer to the table below for folder locations.

Note that it may be difficult to locate the settings folder if you don’t have the ‘Show Hidden Files’ option turned on. Open a Windows Explorer dialog and, from the top menu, select Tools | Folder Options. Select the ‘View’ tab and ensure the ‘Show Hidden Files and Folders’ radio button is checked.
<table>
<thead>
<tr>
<th>Operating System</th>
<th>ClearSCADA Version</th>
<th>Install Directory</th>
<th>Database Location</th>
<th>Global Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 2000, XP, Server 2003 (32 Bit)</td>
<td>ClearSCADA 2009 R2.X</td>
<td>C:\Program Files\ControlMicrosystems\ClearSCADA</td>
<td>C:\Documents and Settings\All Users\Application Data\ControlMicrosystems\ClearSCADA</td>
<td>C:\Documents and Settings&lt;User&gt;\Local\Settings\Application Data\ControlMicrosystems\ClearSCADA</td>
</tr>
<tr>
<td>Windows Vista, Windows Server 2008 (32 Bit)</td>
<td>ClearSCADA 2009 R2.X</td>
<td>C:\Program Files\SchneiderElectric\ClearSCADA</td>
<td>C:\Documents and Settings\All Users\Application Data\SchneiderElectric\ClearSCADA</td>
<td>C:\Documents and Settings&lt;User&gt;\Local\Settings\Application Data\SchneiderElectric\ClearSCADA</td>
</tr>
<tr>
<td>Windows 2000, XP, Server 2003 (64 Bit)</td>
<td>ClearSCADA 2009 R2.X</td>
<td>C:\Program Files (x86)\ControlMicrosystems\ClearSCADA</td>
<td>C:\Documents and Settings\All Users\Application Data\ControlMicrosystems\ClearSCADA</td>
<td>C:\Documents and Settings&lt;User&gt;\AppData\Local\ControlMicrosystems\ClearSCADA</td>
</tr>
<tr>
<td>Windows 2000, XP, Server 2003 (64 Bit)</td>
<td>ClearSCADA 2009 R1.X</td>
<td>C:\Program Files\ControlMicrosystems\ClearSCADA</td>
<td>C:\Documents and Settings\All Users\Application Data\ControlMicrosystems\ClearSCADA</td>
<td>C:\Documents and Settings&lt;User&gt;\Local\Settings\Application Data\SchneiderElectric\ClearSCADA</td>
</tr>
<tr>
<td>Windows 7, Windows Vista, Windows Server 2008 R2 (32 bit)</td>
<td>ClearSCADA 2009 R2.X</td>
<td>C:\Program Files (x86)\SchneiderElectric\ClearSCADA</td>
<td>C:\Documents and Settings\All Users\Application Data\SchneiderElectric\ClearSCADA</td>
<td>C:\Documents and Settings&lt;User&gt;\AppData\Local\ControlMicrosystems\ClearSCADA</td>
</tr>
<tr>
<td>Windows 7, Windows Vista, Windows Server 2008 R2 (64 bit)</td>
<td>ClearSCADA 2009 R1.X</td>
<td>C:\Program Files\ControlMicrosystems\ClearSCADA</td>
<td>C:\Documents and Settings\All Users\Application Data\SchneiderElectric\ClearSCADA</td>
<td>C:\Documents and Settings&lt;User&gt;\AppData\Local\ControlMicrosystems\ClearSCADA</td>
</tr>
<tr>
<td>Windows 7, Windows Vista Service Pack 2, Windows Server 2008 R2 (32 bit)</td>
<td>ClearSCADA 2009 R2.X</td>
<td>C:\Program Files\ControlMicrosystems\ClearSCADA</td>
<td>C:\ProgramData\ControlMicrosystems\ClearSCADA\Database</td>
<td>C:\Documents and Settings&lt;username&gt;\Local\ControlMicrosystems\ClearSCADA</td>
</tr>
<tr>
<td>Windows 7, Windows Vista Service Pack 2, Windows Server 2008 R2 (64 bit)</td>
<td>ClearSCADA 2010 R2.X</td>
<td>C:\Program Files\SchneiderElectric\ClearSCADA\Database</td>
<td>C:\ProgramData\ControlMicrosystems\ClearSCADA\Database</td>
<td>C:\Documents and Settings&lt;username&gt;\Local\ControlMicrosystems\ClearSCADA</td>
</tr>
<tr>
<td>Windows 7, Windows Vista Service Pack 2, Windows Server 2008 R2 (64 bit)</td>
<td>ClearSCADA 2009 R2.2</td>
<td>The files will be installed in 2 locations</td>
<td>C:\Program Files (x86)\SchneiderElectric\ClearSCADA\Database</td>
<td>C:\Documents and Settings&lt;username&gt;\Local\ControlMicrosystems\ClearSCADA</td>
</tr>
<tr>
<td>Windows 7, Windows Vista Service Pack 2, Windows Server 2008 R2 (64 bit)</td>
<td>ClearSCADA 2010 R2.X</td>
<td>The files will be installed in 2 locations</td>
<td>C:\Program Files (x86)\SchneiderElectric\ClearSCADA\Database</td>
<td>C:\Documents and Settings&lt;username&gt;\Local\ControlMicrosystems\ClearSCADA</td>
</tr>
</tbody>
</table>
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Technical Support:  888-226-6876  (888-2CONTROL)